

Alaska Health Information Exchange Direct Secure Messaging

**Alaska Department of Health and Social Services
Division of Health Care Services
Health Information Technologies Program Office**

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Revision History

VERSION NUMBER	DATE	DESCRIPTION / LOCATION OF CHANGE
0.1	4/24/2012	Initial Draft
0.2	8/20/2012	Changes
0.3	8/29/12	Updates to Attachments
0.4	9/21/12	Addition – Saving Files

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1 Direct Secure Messaging Overview

Direct Secure Messaging (DSM) is a HIPAA-compliant, encrypted email system that has been developed by a workgroup of State and Federal entities sponsored by the National Coordinator for Health Information Technology; it is intended to facilitate sending personal health information (PHI) between HIPAA-covered entities. DSM has advantages because it encrypts both the message body and any attachments. Also, because all DSM users are validated and have been assigned a specific DSM email address you can be assured the individual on the receiving end of your message is also a HIPAA-covered entity. Because DSM requires that both the sender and receiver have DSM addresses you can't inadvertently send a message containing PHI to a non-DSM non-HIPAA compliant recipient.

1.1 Purpose

DSM can be used as an alternative to PHI exchange that you currently do via mail, fax, or YouSendIt. Since you can only send to a recipient that has DSM account, you should continue to use other methods for exchange with non-participating entities.

2 Using DSM

2.1 References

- DSM Portal: <https://alaskahie.com>

2.2 Technical Support for DSM

- For technical support of DSM please either email: support@ak-ehealth.org or call 1-855-970-2626 between Monday – Friday 8 AM – 5 PM AST.

2.3 Login to AK Health Information Exchange

DSM resides within the State of AK Health Information Exchange (HIE) Portal. User must login to the HIE Portal to access DSM.

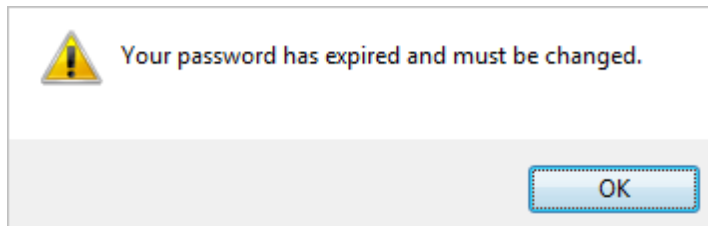
Log in to Clinical Portal by entering:

1. User ID
2. Password,
3. Click **Login** button

Note: Your User ID is not case-sensitive. Your password will always be case sensitive.

Password Expired

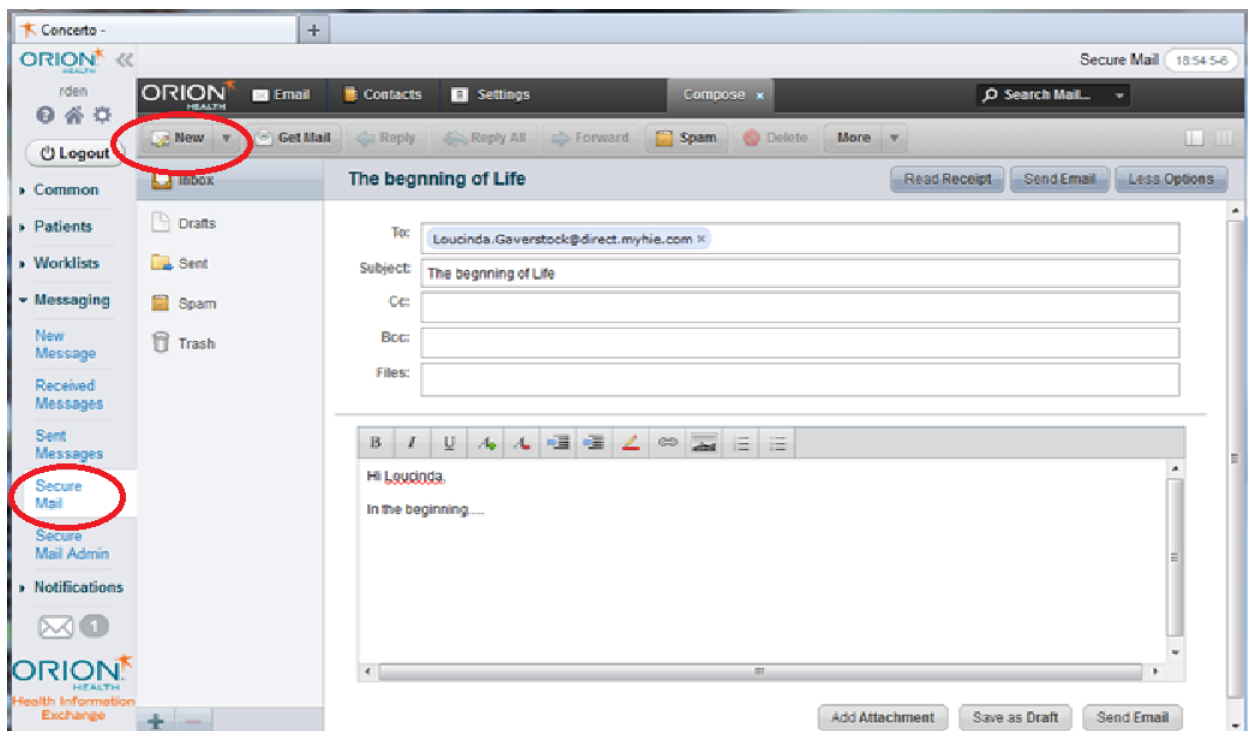
Your password is likely to have been configured to expire after you first login. You will be warned when your password is about to expire and when it does, the following dialog is displayed:



Follow the prompt and change your password. Your password must have at least 8 characters with a combination of at least 1 uppercase letter, 1 lowercase letter, 1 numeric character, and a symbol.

2.4 Create Messages

To compose a **new message in Secure Mail**, click on **"New"** and select **"New Email"**. All of the general features to composing an email apply in DSM, such as **bolding**, *italics*, and underlining. You can also link documents and insert pictures in DSM.



2.5 Contacts Lists

Contacts allows the user to view Contacts (Email Addresses) that are either in the system (local domain users) or Email addresses that the user has created and used previously. Orion Health's DSM Contacts function has a number of pre-configured groups that the user can use, but cannot delete. At the same time the user may create their own groups for their own use.

In DSM, you can access the Contact Lists by clicking in **Secure Mail>Contacts**. Contact lists are a means by which the user can group Email Addresses and find them easily. The list is not a distribution list or a group email list, but a user identified list that the user can use to categorize the Email Addresses.

By using the "More" button the user can select all Email Addresses in the group, then select the "Mail" button and the system will create a new Email with all the Email Addresses in the "To:" field. Thus a Contact list can be used in this manner as a Distribution List if required.

Below is a description of the preconfigured Contact Lists that the user will see when first viewing their Contacts page. They do not need to be used, but they cannot be deleted.

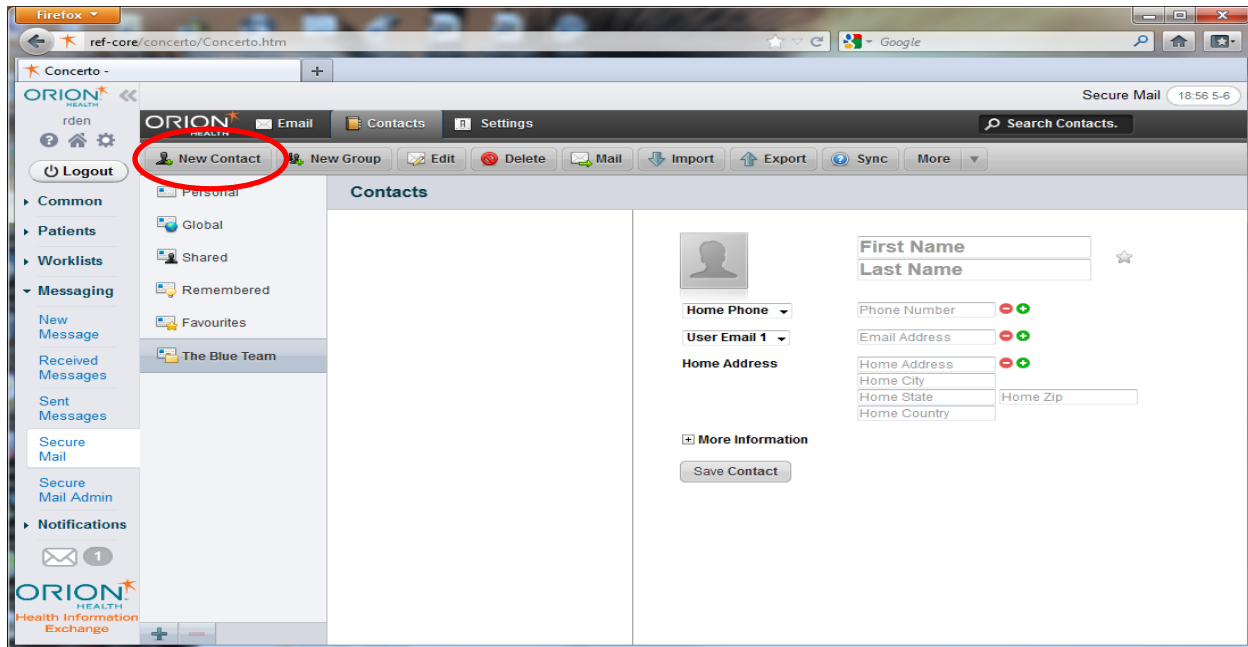
- ★ "Personal" list
Preconfigured personal list that a user can add Email Addresses to for personal use. No other user has access to this list.
- ★ "Global" list
Preconfigured list that contains all the local Email Addresses in the Domain / system. This list is displayed to all users and you cannot copy Email addresses from this list into your other lists
- ★ "Shared" list
Preconfigured list that you as a user can share with other Domain users. To share with another domains user enter or copy an Email Address into this list, select the Email Address in this list, edit the Email Address, then turn on "Shared Contact" and enter the user you wish to share the contact with. A smart list will display as you type the user into this field.
- ★ "Remembered" list
Preconfigured list that stores all Email Addresses you have typed into an Email and subsequently sent the email. This list only remembers Email Addresses that are not already in other folders.
- ★ "Favorites"
Preconfigured list that can be used by the user for any purpose, and is another example of a list.
- ★ These symbols (+ -) allows the user to create more folders or delete folders they no longer require. When creating a folder, with the + symbol or the button, the user can give any name to the folder. Some special characters are not allowed in the name.

If the user deletes the Global, Shared, Remembered or favorites Contact Lists, the system will re-instate these folders the next time the user logs on. Hence they cannot be deleted.

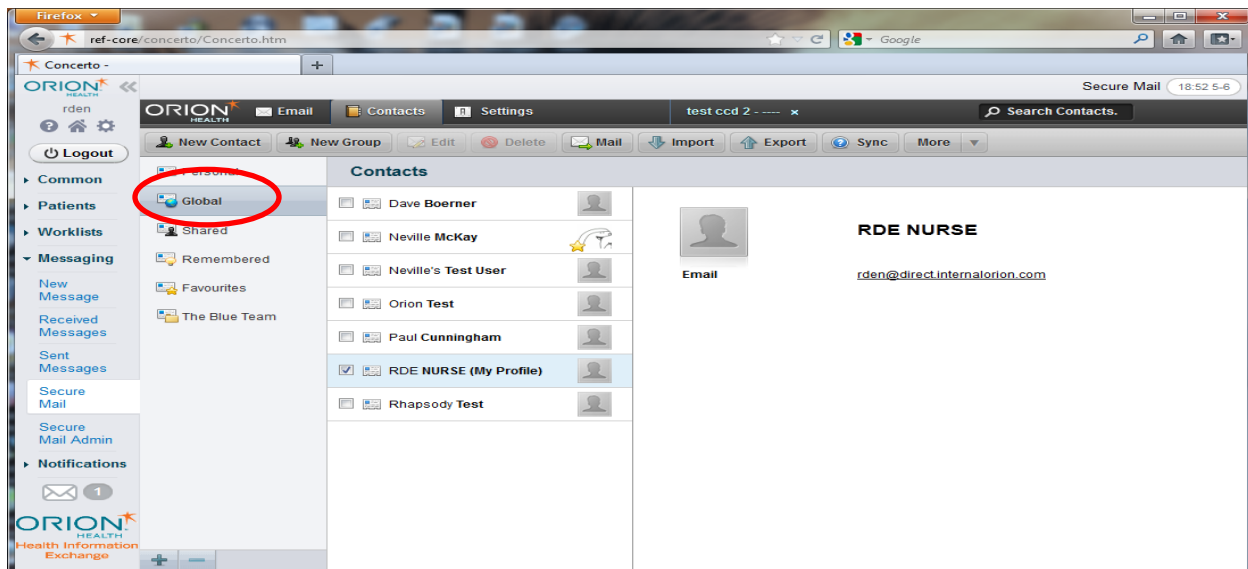
Or simply create a list of your own i.e. "The Blue Team".

Once you've created your Contact list, click on "**New Contact**" and fill-in the information in the window on the right.

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Notice by clicking on a list, i.e. **Global** as seen in this diagram, the name of the contacts within that list appears in the center of your screen, and to the right, the contact ID and email address appear.



2.5.1 Deleting “Remembered” or “Sticky” Email Addresses

As with all email systems, users send messages to many email address that are not in their contacts or address book and the system will “remember” these email addresses. These “Remembered” email addresses are sometimes referred to as “Sticky” email addresses or “Saved” email addresses and are normally automatically displayed when the user starts typing in an email address in the To, CC or BCC lines in the email.

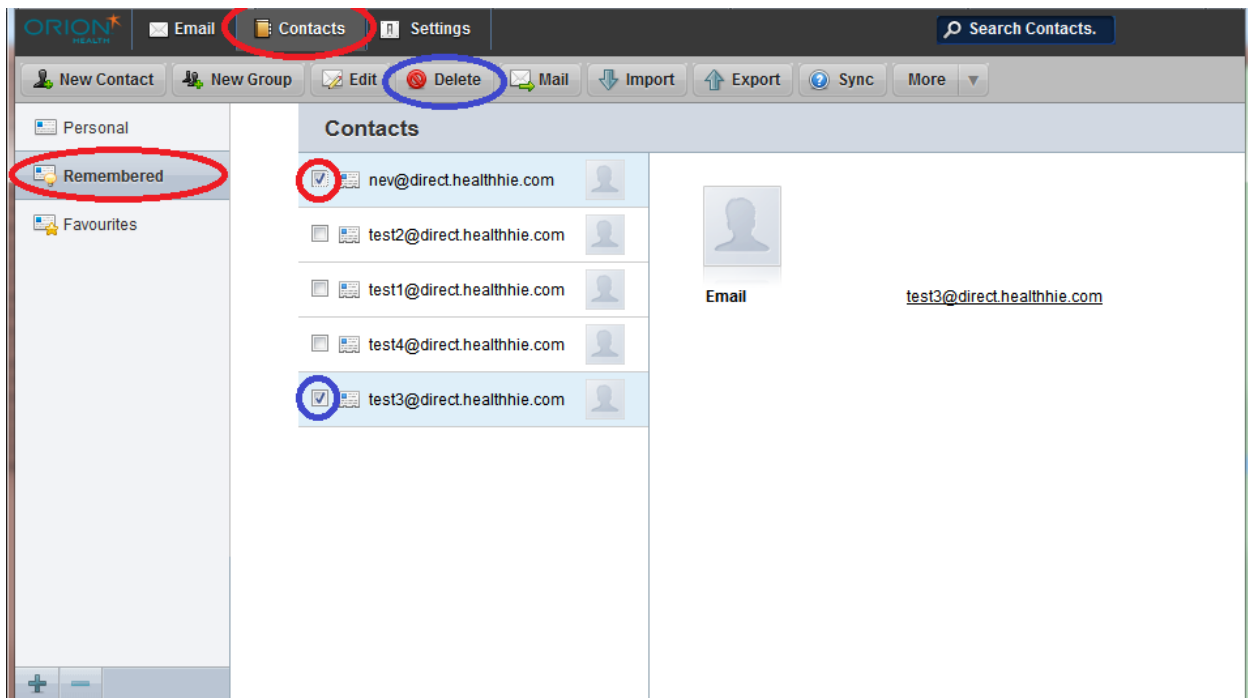
Some systems store these addresses in the contacts / address book lists, and others place these addresses in a separate file on the system. Orion Health’s system stores these emails in the Contacts list under the “Remembered” folder.

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As a user may type in the wrong email address, or the recipient might leave their company, or the email address may no longer exist for whatever reason, users will want to delete these “Remembered” or “Sticky” addresses at some stage. To delete these old “Remembered” or old “Sticky” email addresses in the Orion Health’s system the user must:

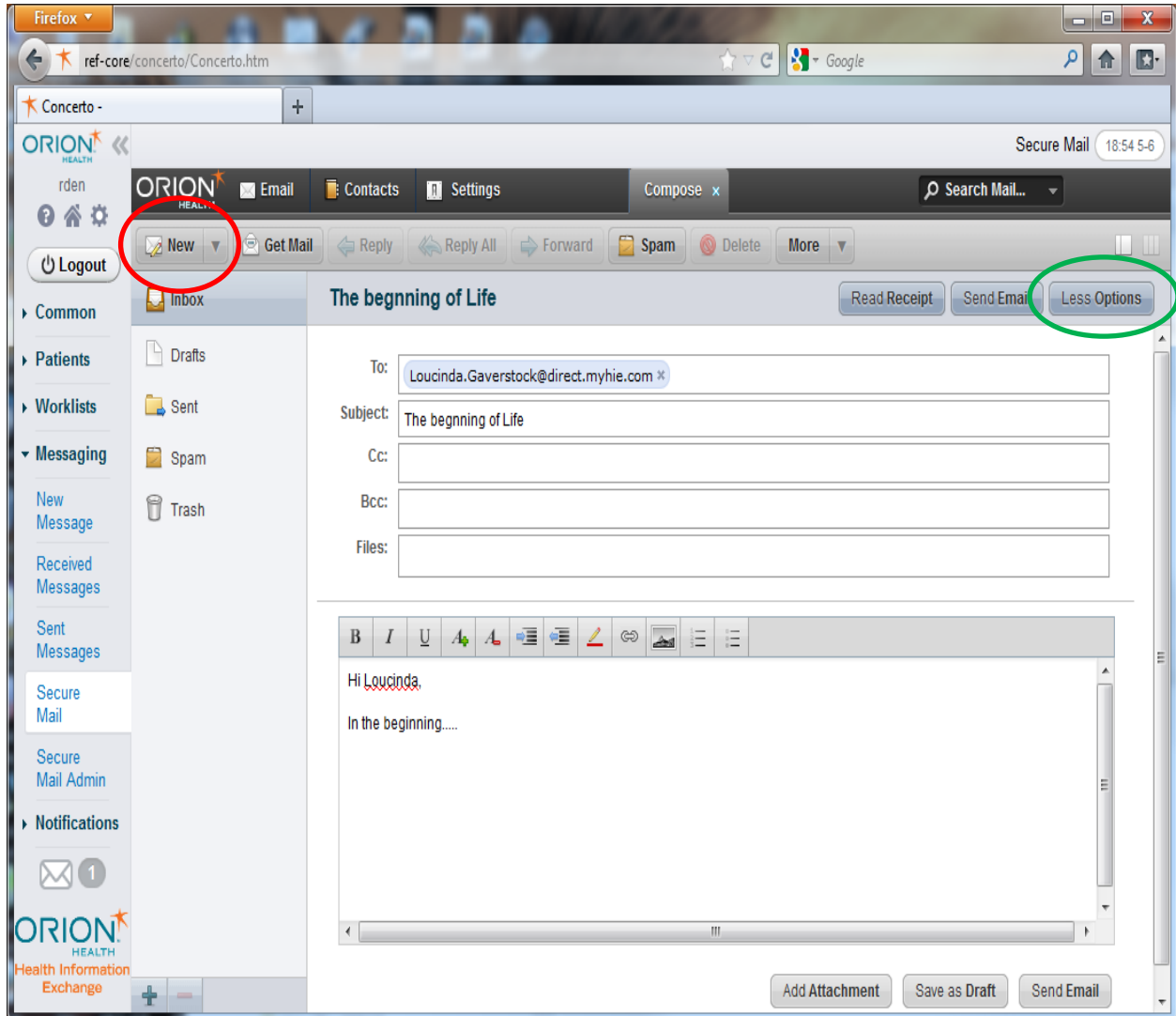
- Go into the Contacts list via the menu button on the top on the DIRECT Secure Messaging screen
- Selected the “Remembered” folder on the left hand menu
- De-selected (remove the tick in the box) of the top Direct Email address that is selected by default
- Select (tick in the box) of the Direct Email address(es) that you wish to delete
- Select the “Delete” button from the menu bar (second from the top)
- The entry is deleted with no prompt

When a new email is started this deleted “Remembered” Direct Email address will **not** be displayed. Be aware that any (previously) started emails may still display the deleted address, it is only newly started emails, after the delete process, that will not display the deleted email address.



2.6 To Send A DSM Message

Select the **Messaging>New Message** menu item: the **New Message** screen is displayed, as shown in the following screenshot:

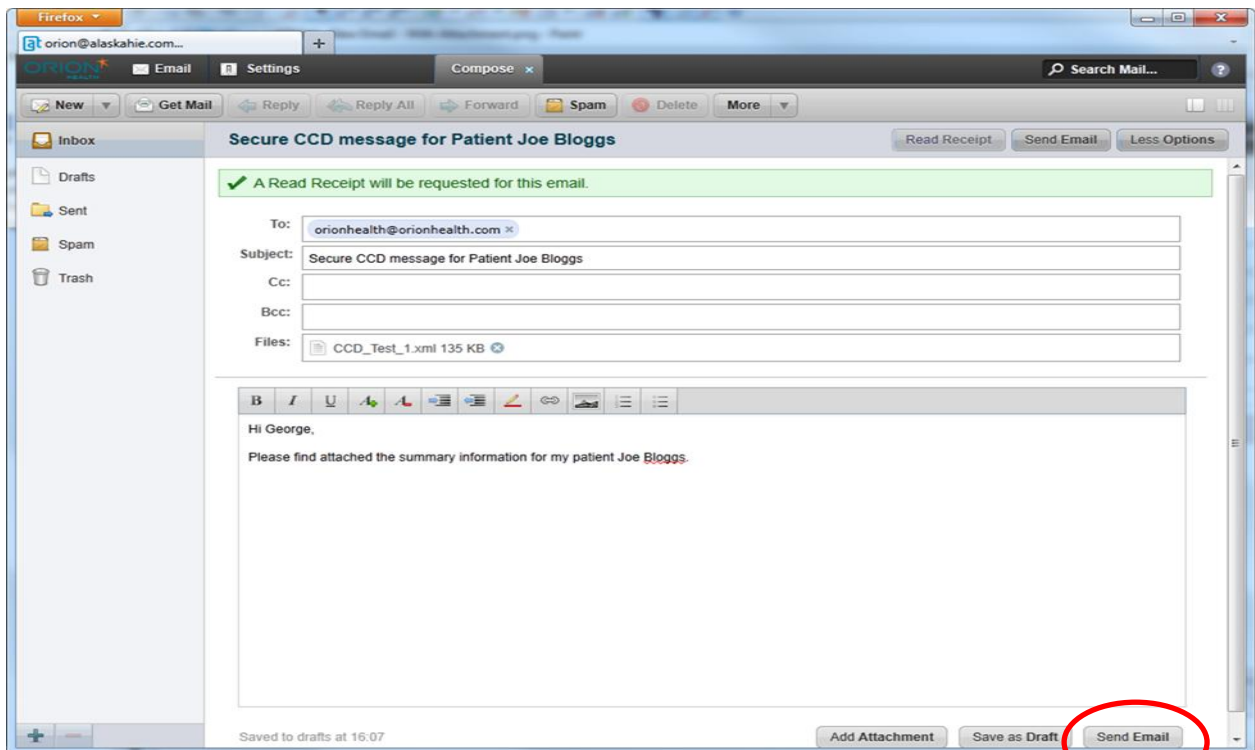
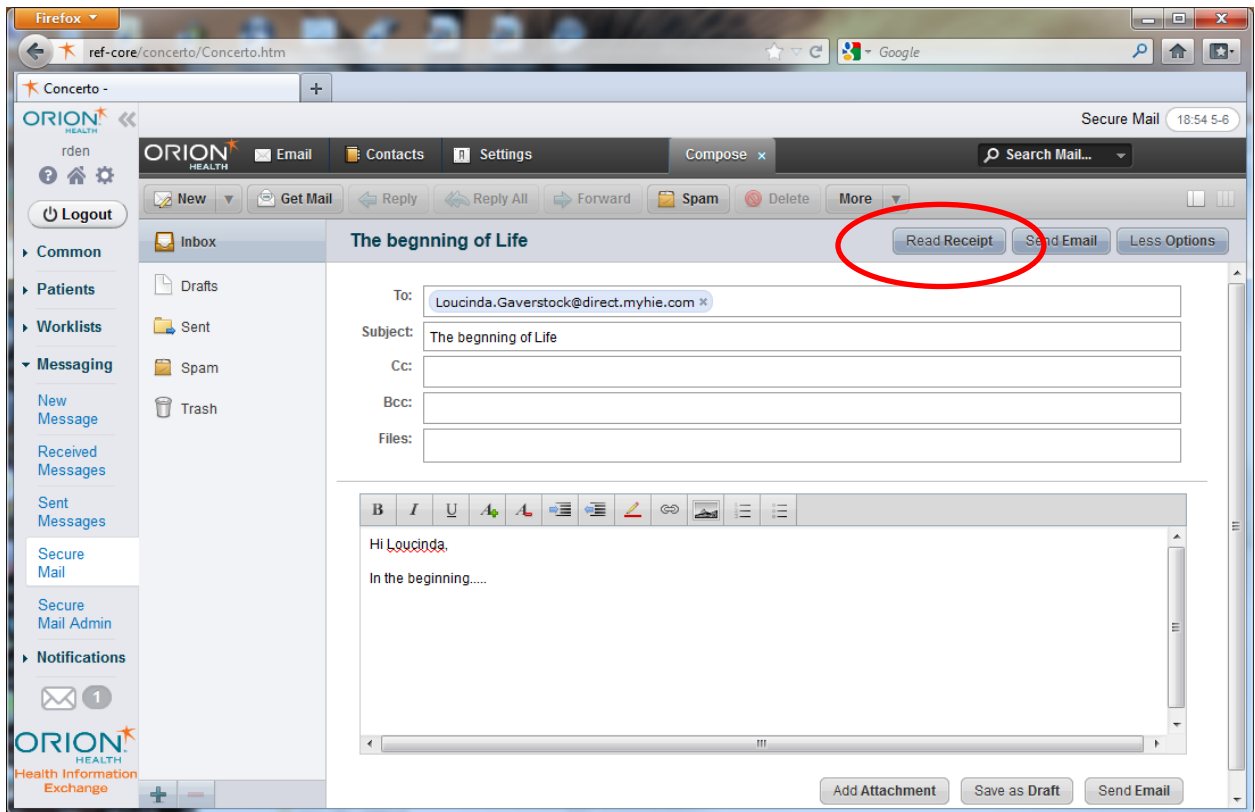


Complete the fields on the screen (please note: by default the CC, BCC and Files are not displayed – you must select the **“More Options”** button on the top right. (where the **“Less Options”** is in this screen shot):

Field	Description
To	Click the “Contacts List” to find the Recipient and select the email link on their detail pane.
Subject	Type the text you want to be displayed for this message in the recipient's inbox.
Message	Type your message.

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If you want to be notified when the recipient has opened this message, select the **"Request a Read Receipt"** checkbox and begin to compose your message.



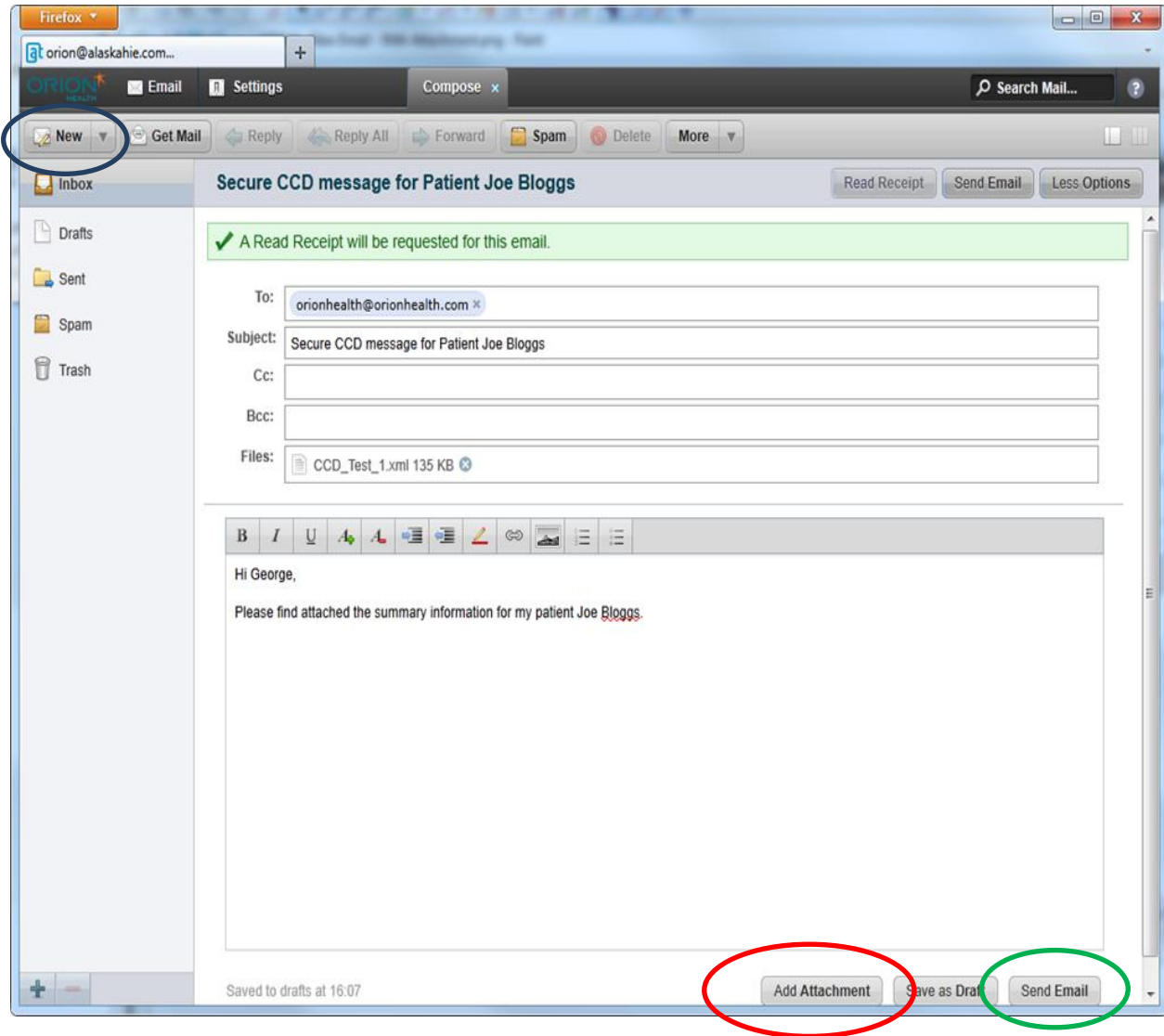
Click the **Send** button.

! Please note, once a message has been sent it cannot be recalled and a copy of it will be stored in the Users Sent Box.

2.7 Adding an Attachment to a DSM Message


To “Add an Attachment” to your email:

1. Click “**New**” from the Document Tree.
2. Click Read Receipt if you want a “**Read Receipt**” when the receiver reads the message.



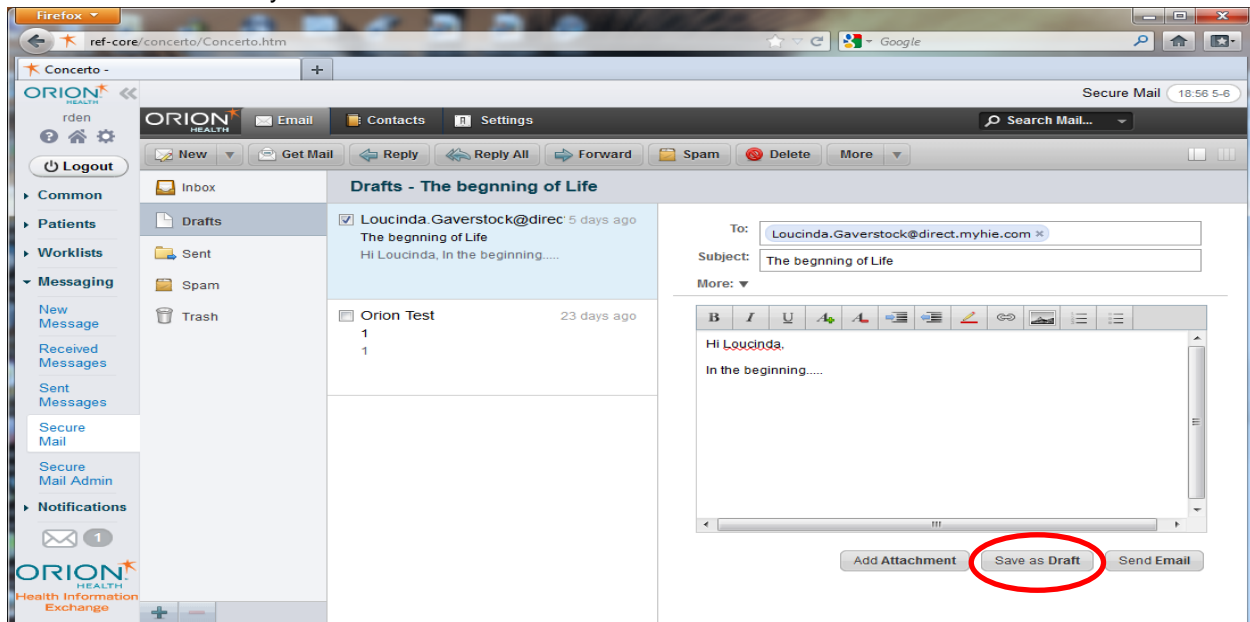
3. Complete the fields on the screen. If you want to add an attachment, click “**Add Attachment**” located on the bottom of the email page, following the content body, and navigate the browser to select your file from your library.
4. Once you are finish and ready to send, click the **Send Email** button.

! Attachment size is limited to 2 MB and a total of 25 attachments can be included in a single email for a total of 50 MB per email message.

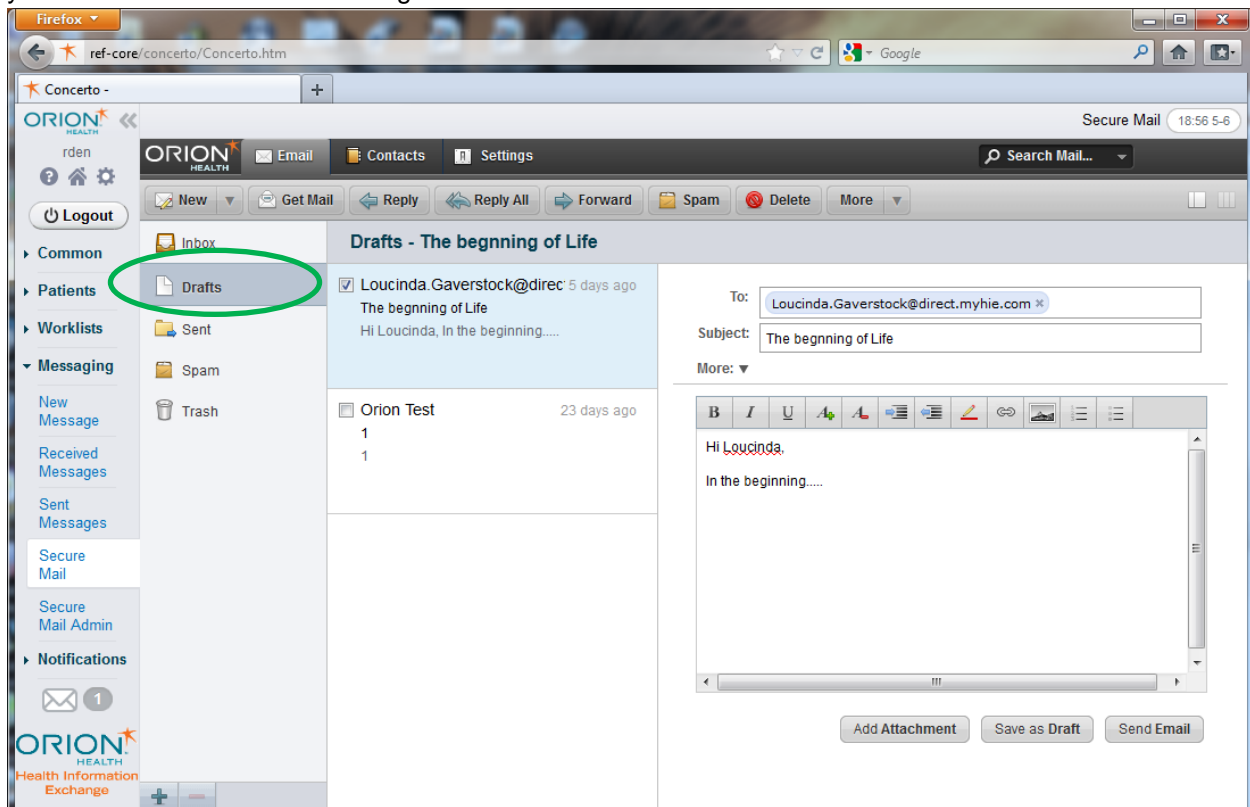
 Please note, once a message has been sent it cannot be recalled and a copy of it will be stored in the Users Sent Box.

2.8 Creating a Draft of a DSM Message

Creating Drafts of an email is also available in DSM. Let's say you begin compose a message, but needed to step away for a few moments. Simply click **"Save as Draft"** on the body of your email page, and it will be saved to your drafts folder.



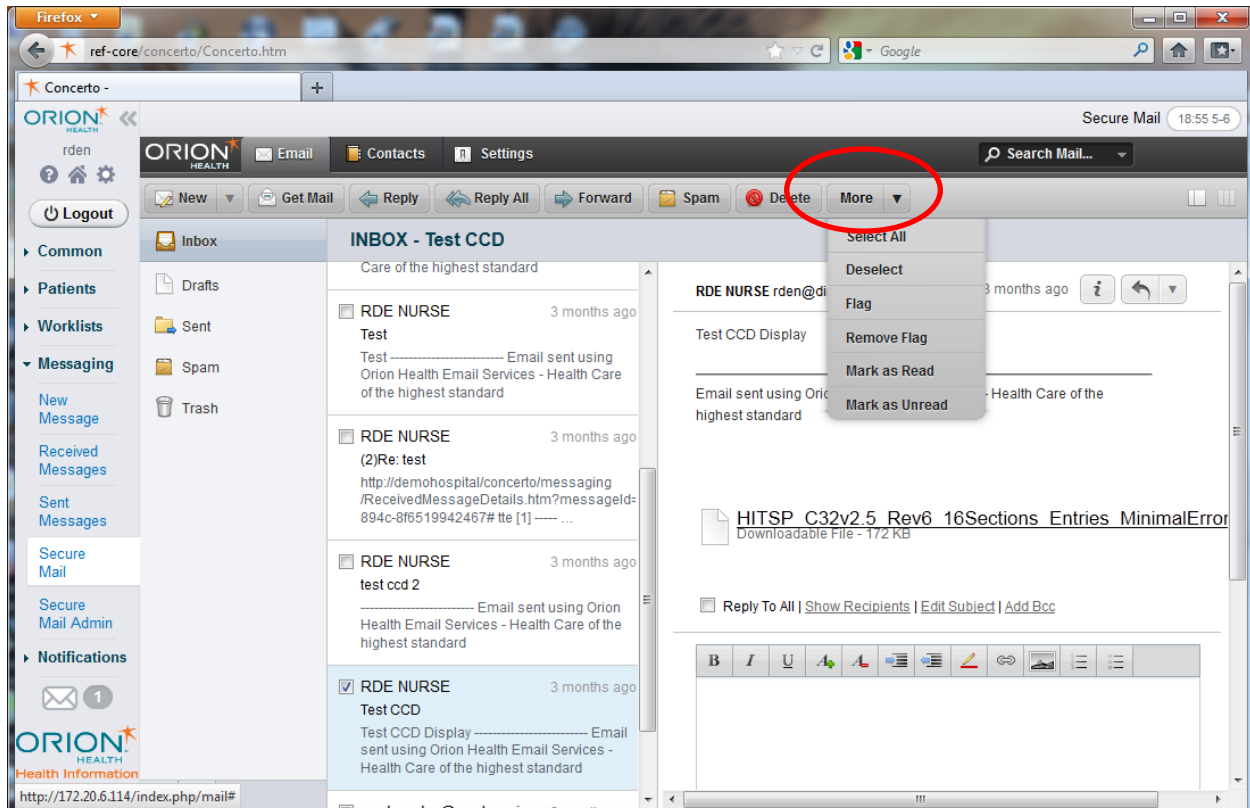
When you are ready to continue composing, simply click open the **"Drafts"** folder, and select the email you would like to continue working on.



2.9 Other Features in DSM Messaging

Select **Secure Mail>More**. Notice the drop down box, which contains:

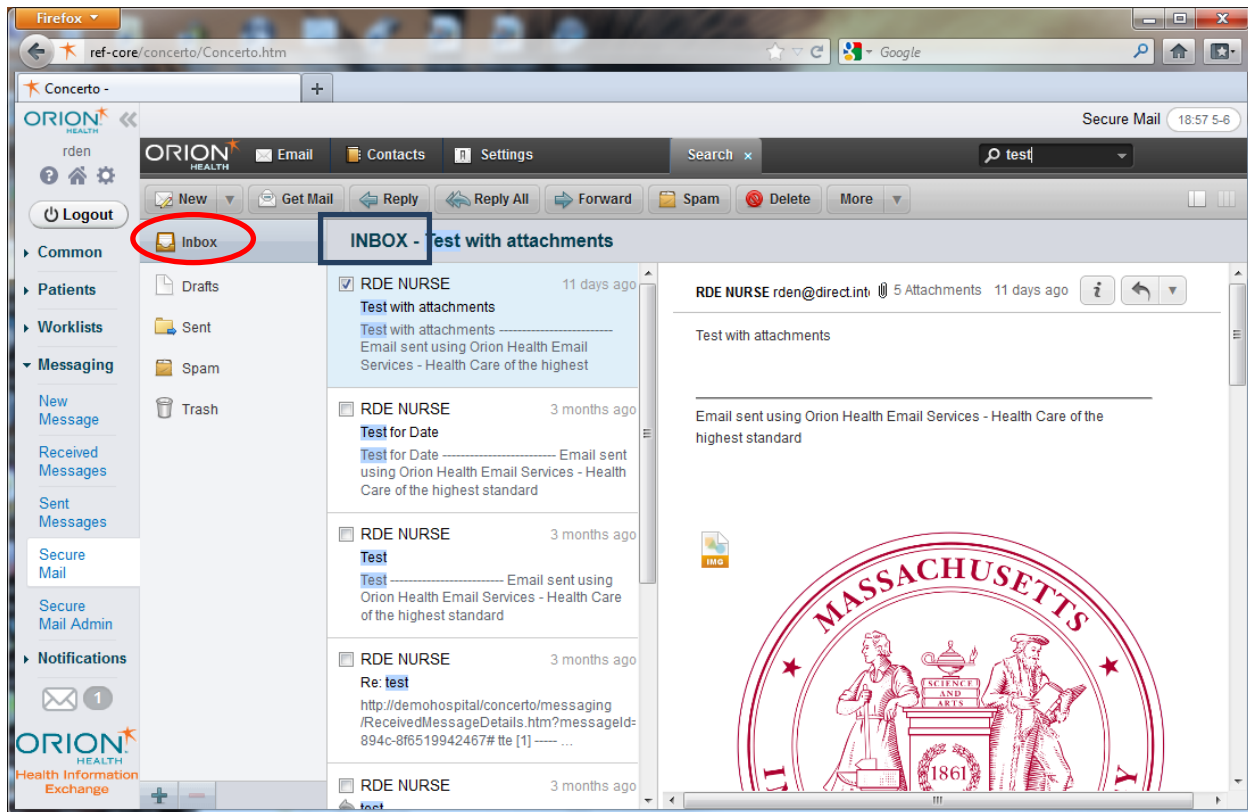
- ★ Select All (allows you to **Select All** the emails you have received or sent (does not select the content))
- ★ Deselect (allows you to **Deselect** items selected)
- ★ Flag (allows you to **Flag** emails you want to stand out to you)
- ★ Remove Flag (allows you to **Remove Flags** previously selected)
- ★ Mark as Read (allows you to mark emails received as **Read**)
- ★ Mark as Unread (allows you mark emails as **Unread**)




2.9.1 Reading Messages

To read messages:

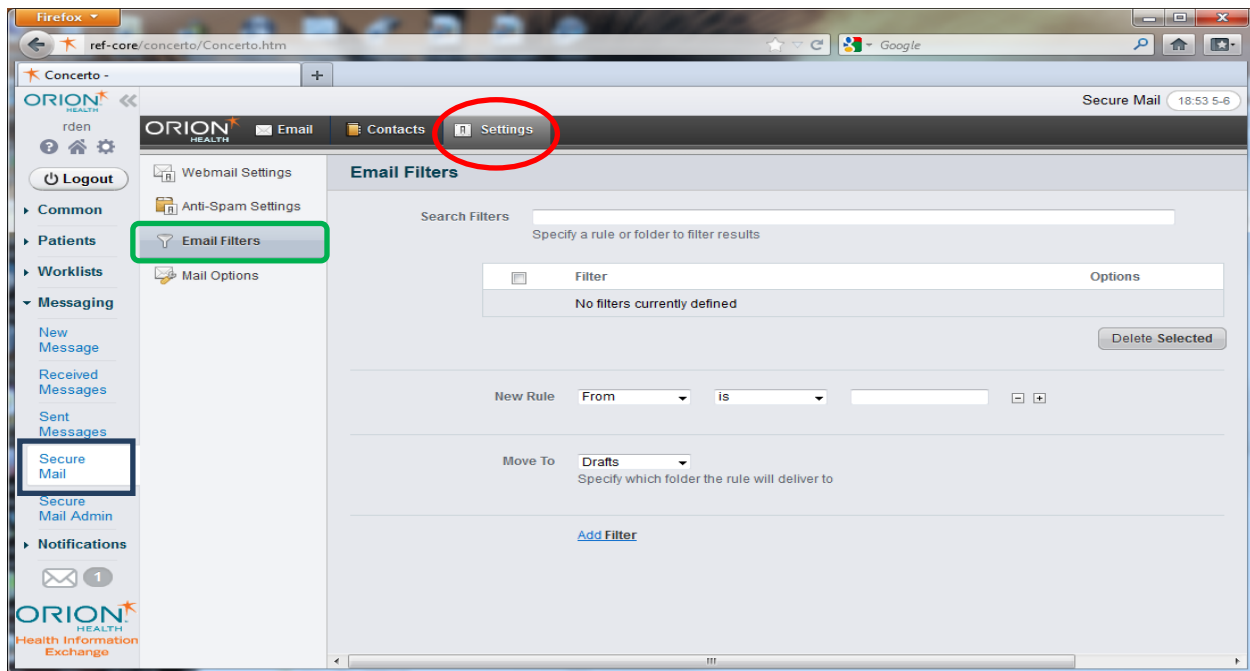
Select **Secure Mail>Inbox** menu item. The **INBOX** screen is displayed, as shown in the following screenshot.



 If the sender asks to be notified when you read the message they sent, the subject of that message will be preceded with the word **Read:** for example, Read: John Cardinal -

2.9.2 Filtering Messages

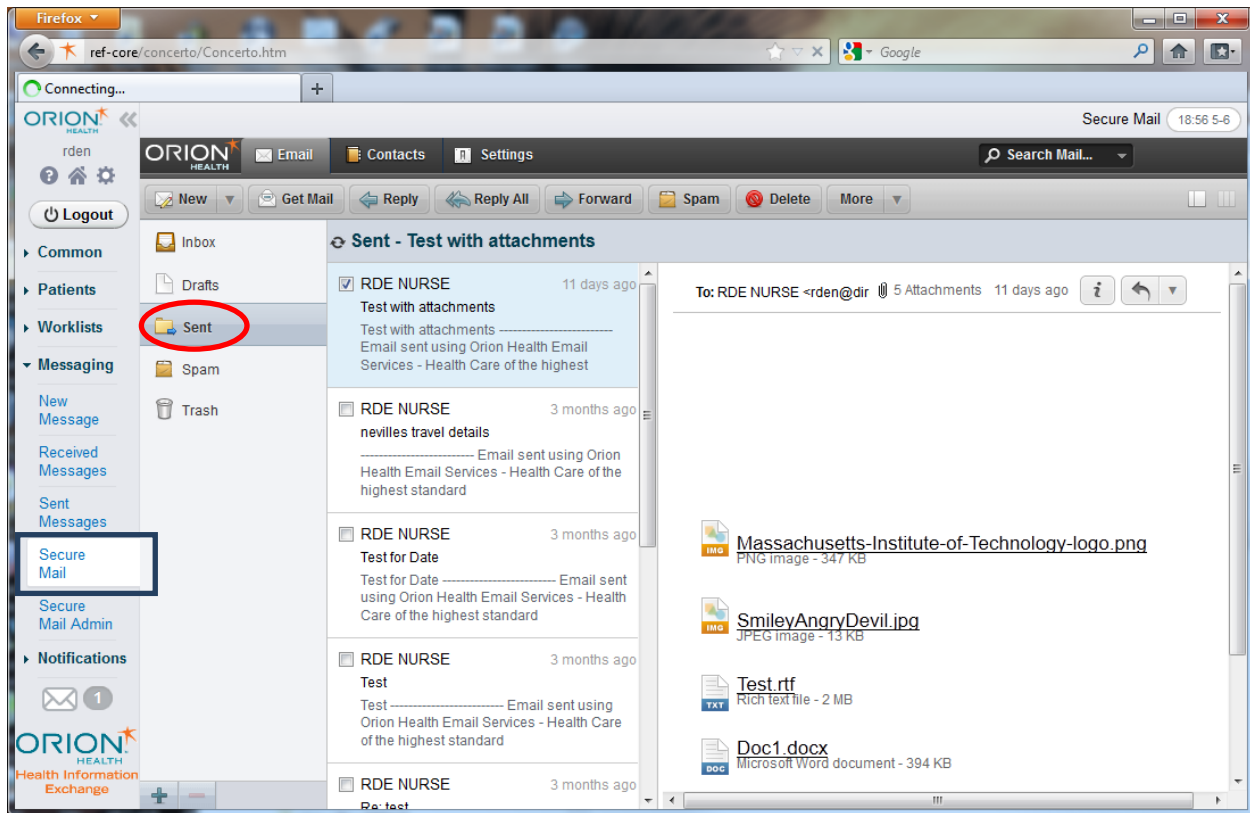
In DSM, you can filter messages received by clicking on **Secure Mail>Settings>Email Filters**:



2.9.3 Sent Messages

To view previously sent messages, select the **Sent Messages** menu.

A list of messages you have sent to other Users is then displayed.



Select a message to view the message details.

Sent Message Options

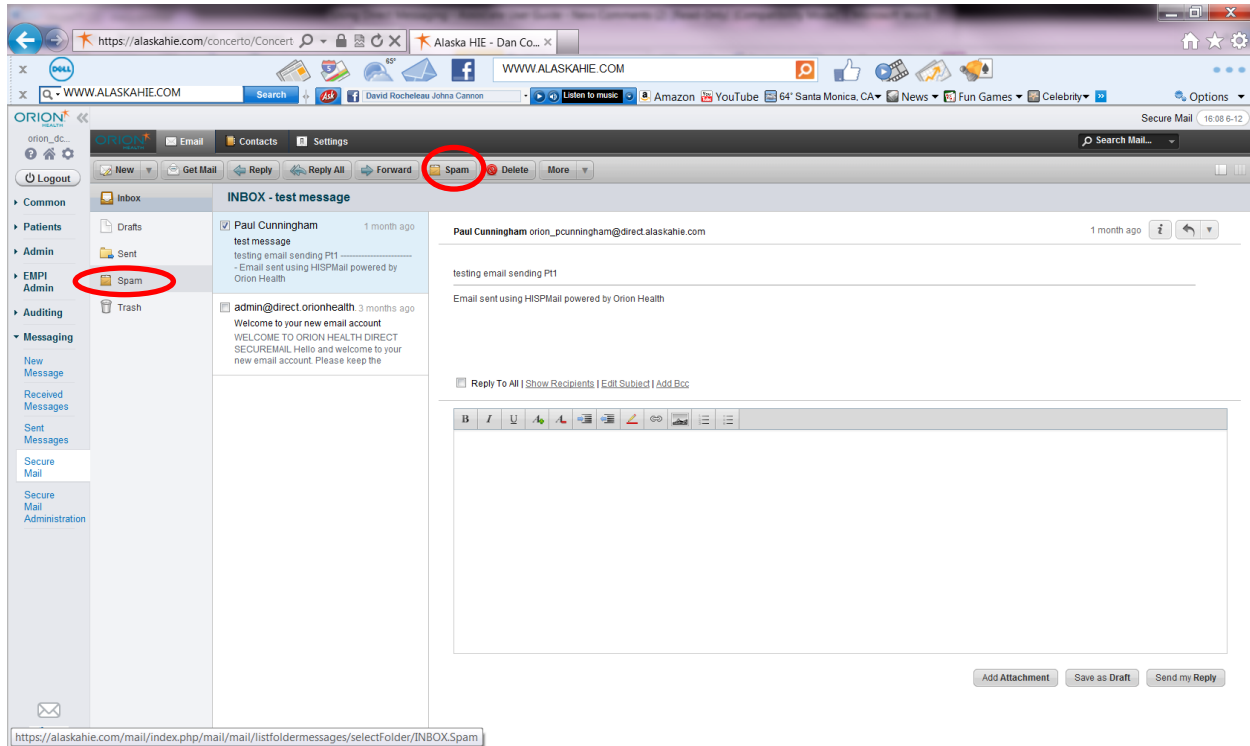
The following options are available on the **Sent Messages** list:

- If you have any questions regarding your Direct Message mailbox, please see your Administrator for questions and answers.

2.9.4 Spam Messages


Any messages you receive that you don't want ~ or isolated an outside vendor that you don't want, just add them to your **"Spam"** folder.

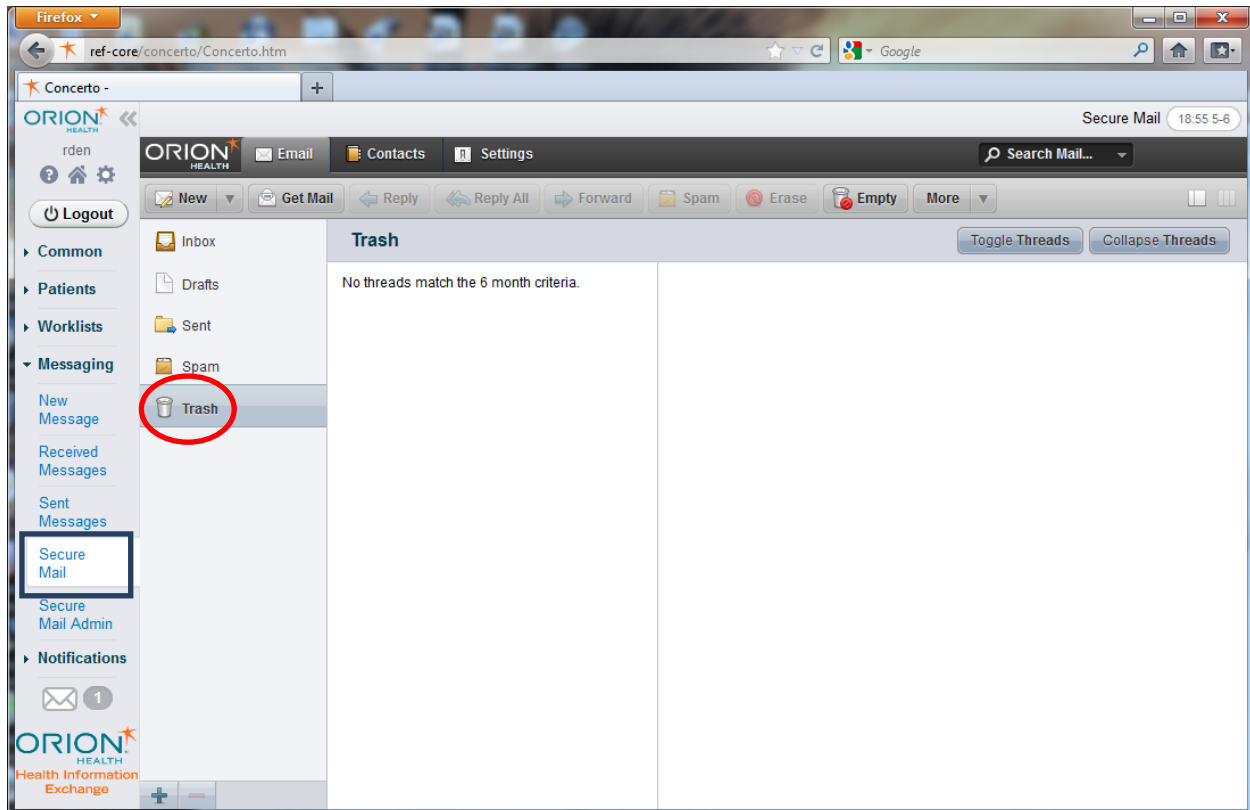
Note: You should never receive Spam emails, as you are working in a secure network. However, should you see something in this folder, please contact your network administrator.



2.9.5 Deleting or Throwing Away Messages

Any messages no longer needed, can be throw in the “Trash”. Select **Secure Mail>Trash**.

 Remember, trash is a holder for deleted emails. You still have to empty the trash to permanently delete the email.

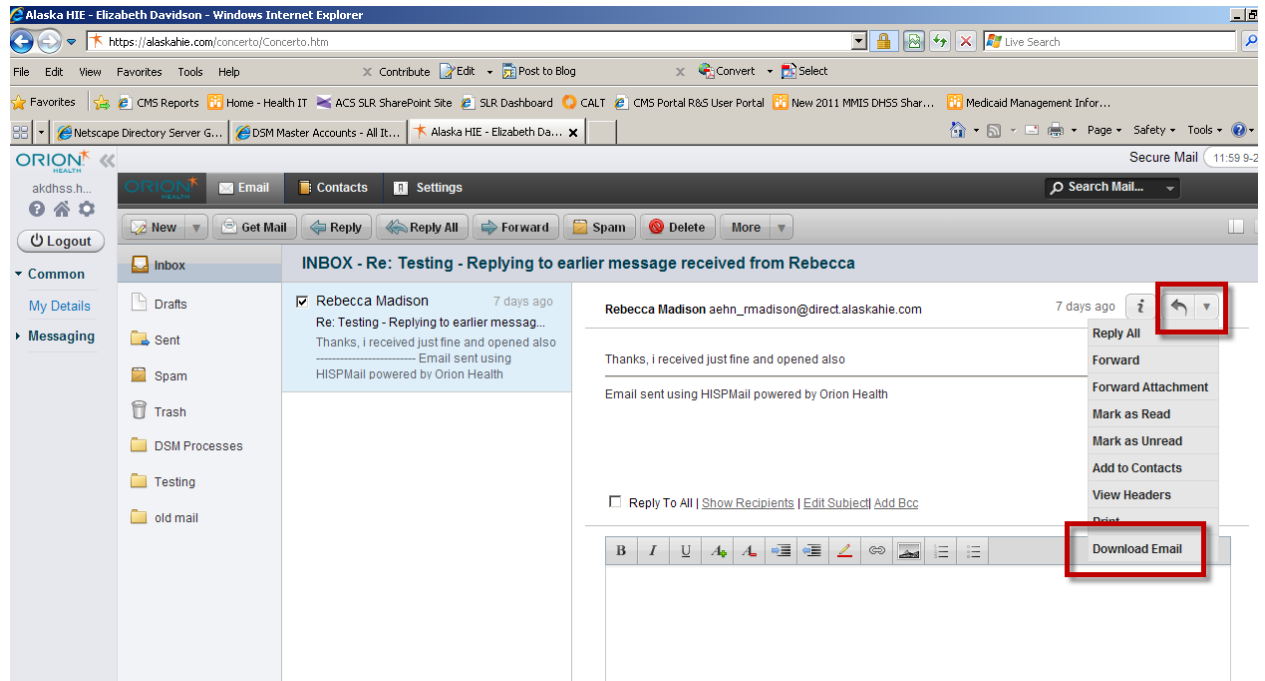


2.9.6 Saving DSM Messages

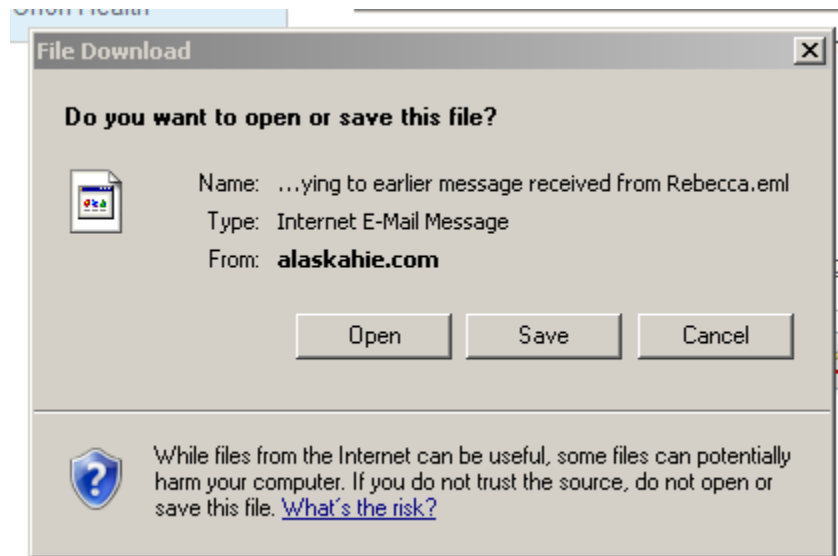
Users have the capability to save DSM messages as either .eml files to be viewed at a later date in Internet Explorer

- Navigate to the DSM message you wish to save
- Select the "Arrow" indicator drop down in the top line of the email and select "Download Email"

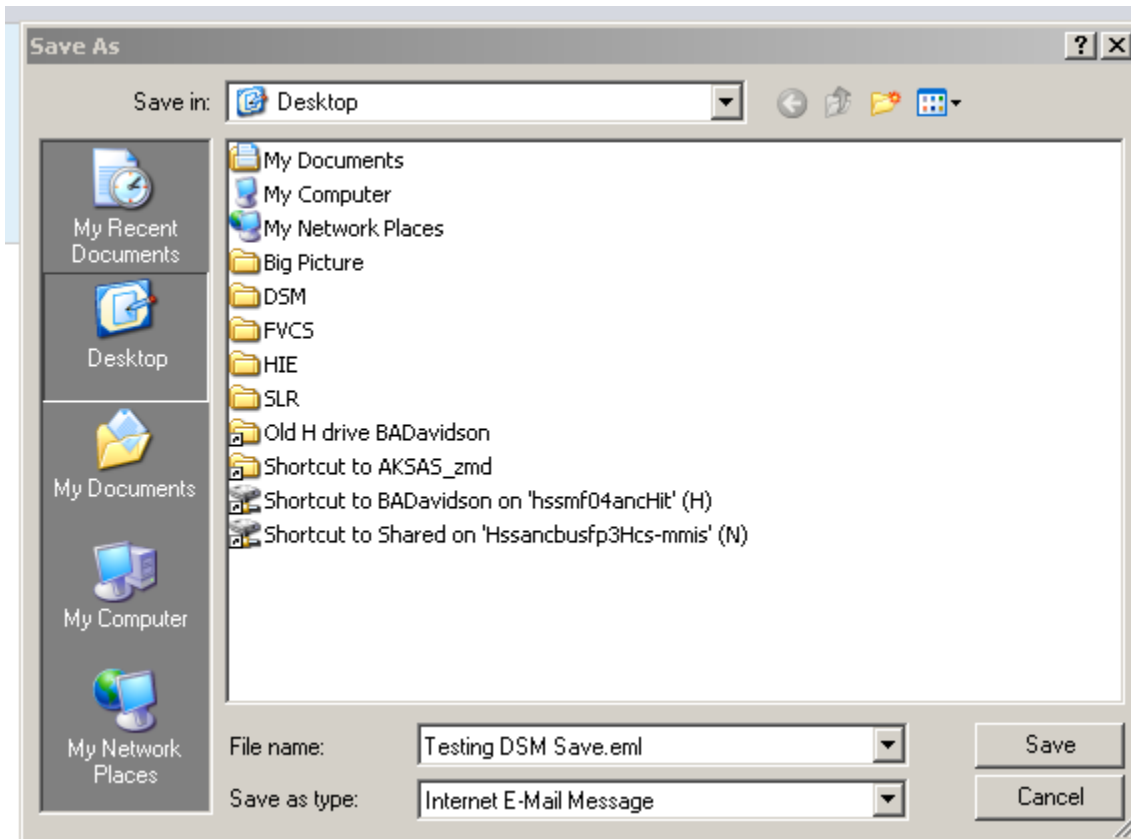
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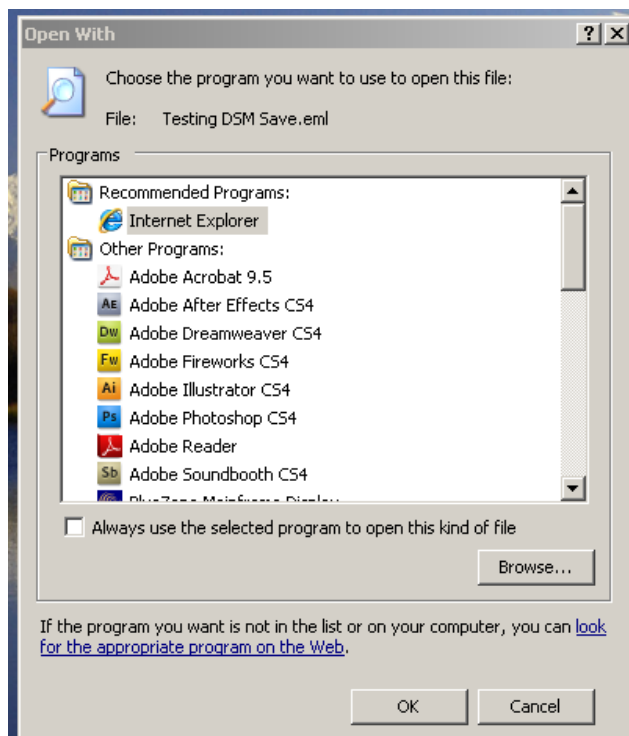
- A file download box will appear, select "Save"



- Browse to the location where you wish to save the message and save the message as an "Internet E-Mail Message"



- In order to view the saved message, double left-click on the message where you have it saved. An "Open With" box will appear, select Internet Explorer and click "Ok". The DSM email message should appear in an Internet Explorer window.



3 Settings

The Orion Health DSM allows the user to alter some DIRECT Secure Messaging settings at a user level. Settings that are grayed out are unavailable to change. Also some of the settings are not used due to the nature of DIRECT Secure Messaging.

3.1 Webmail Settings

The screenshot shows the 'Email Settings' tab in the Orion Health DSM webmail interface. The left sidebar contains 'Webmail Settings', 'Anti-Spam Settings', 'Email Filters', and 'Mail Options'. The main content area includes the following settings:

- Account Name:** nev@direct.orionhie.com. Below it, a note states: 'This is your email account login name.'
- Quota:** A progress bar showing '3.3 of 1024MB used.'
- Real Name:** Neville McKay. Below it, a note states: 'The name that will appear on outgoing emails.'
- Reply To:** nev@direct.orionhie.com. Below it, a note states: 'A Reply To field allows you to specify a different reply email address to your normal login. Responses to your emails sent with a Reply To address defined will be delivered to that address.'
- Thread Support:** A toggle switch set to 'ON'. Below it, a note states: 'Toggle to display email messages as threads, if supported by server.'
- Thread Limit:** A dropdown menu set to 'Infinite'. Below it, a note states: 'Determines how old emails can be before they are not included in threads.'
- Display Email Images:** A toggle switch set to 'ON'. Below it, a note states: 'Toggle to automatically display external images in email messages.'
- Automatic Draft Save:** A toggle switch set to 'ON'. Below it, a note states: 'Save drafts automatically while composing email messages.'
- Automatic Folder Reload:** A dropdown menu set to 'Enabled - With audio notification'. Below it, a note states: 'Enable automatic checking for new email in the currently selected folder. Optionally enable sound notification for new messages.'

A 'Save Settings' button is located in the top right corner of the settings panel.

This screenshot shows the continuation of the 'Email Settings' tab. The settings include:

- Delete Trash on Logout:** A toggle switch set to 'ON'. Below it, a note states: 'Automatically delete all mail from the Trash folder upon logout.'
- Default View:** A dropdown menu set to '3 Pane'. Below it, a note states: 'Select the mode to render the Webmail interface.'
- Interface Language:** A dropdown menu set to 'English'. Below it, a note states: 'Select the Language to render the Webmail interface.'
- Date display:** A dropdown menu set to 'Time Since Delivery'. Below it, a note states: 'Select the display format for date received.'
- Messages per page:** A dropdown menu set to '10'. Below it, a note states: 'Select the number of email messages to display per page.'
- Timezone:** A dropdown menu set to 'Pacific/Auckland'. Below it, a note states: 'Specify your timezone for date calculation in the Web-interface.'
- Signature:** A rich text editor with a toolbar containing icons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, and a text area for the signature.

A 'Save Settings' button is located in the top right corner of the settings panel.

Real Name

This will appear in the "Sender" field of emails you send before your email address.

Reply To

Here you can specify an email address for replies to be sent to, instead of the email address you use to log in.

Thread Support

Select "On" to display email conversations as threads.

Thread Limit

Select 3 months, 6 months, 1 year, 2 years or infinite as how far back to hold the thread trail.

Display Images

Select "On" to display the image rather than as an attachment in the email.

Automatic Draft Save

Select "On" to have the system automatically save your emails as a draft as you compose them.

Automatic Folder Reload

Select the method to have new emails delivered to your inbox.

Delete Trash on Logout

Select "On" to have the system automatically empty your Trash folder on logoff.

Default View

Select "2 Pane" or "3 Pane" as your default view for your emails.

Interface Language

Select your preferred language for the Webmail interface.

Date Display

Select your preferred method for displaying dates on the email headers. (Time Since Delivery, MM/DD/YY or DD/MM/YY)

Messages per page

Select the number of simultaneous messages to display in the Webmail interface. You may want to reduce this for slow connections.

Timezone

Specify the time-zone for your location.

Signature

Here you can specify a message that will be added to the end of every email you send from Webmail. You can use plain text or HTML for your signature.

3.2 Anti-Spam Settings

As the DSM system is a trusted network of Email providers, you should never get any spam emails in this folder. Unless you set up a filter to put emails in this folder. Hence the standard settings should be left as they are.

The screenshot displays the 'Anti-Spam Settings' window in the Orion Mail application. The sidebar on the left contains links to 'Webmail Settings', 'Anti-Spam Settings', 'Email Filters', and 'Mail Options'. The main content area is titled 'Anti-Spam Settings' and includes a 'Save Settings' button in the top right corner. The settings are organized into several sections: 'Spam Filter Sensitivity' with a slider ranging from 1 to 20; 'Message Classification' with a dropdown menu currently set to 'Mark as SPAM (default)'; 'Spam Tag' with a text input field containing '{SPAM}'; 'Whitelist senders' with a large, empty text area; and 'Blacklist senders' with a smaller, empty text area. A descriptive note for the whitelist states: 'Specify a list of email addresses and domains to whitelist. Each entry must be on its own line. Any email or domain that matches will automatically be flagged as trusted without being classified as Spam.'

Spam Filter Sensitivity

Set the degree to which the spam filter looks for spam within emails.

Message Classification

The default action to take on emails that are classified as spam. (Mark as Spam, Move to Spam Folder, Purge Message)

Spam Tag

The wording to be added to the email header if an email is considered to be spam.

Whitelist senders

Senders or sender domains that send emails but the spam filter picks up as spam. Placed in here all emails from these senders or sender domains are delivered regardless of their content.

Blacklist senders

Senders or sender domains that you believe are sending spam. Placed in here you will not get emails from them.

3.3 Email Filters

Emails can be delivered to folders depending on a “Matching Criteria”.

The screenshot shows the 'Email Filters' settings page. On the left is a sidebar with 'Webmail Settings', 'Anti-Spam Settings', 'Email Filters' (selected), and 'Mail Options'. The main area has a 'Search Filters' section with a text input and a 'Filter' table. The table has columns for 'Filter' and 'Options'. One filter is listed: 'subject contains "Read" filters to Processed,read processed' with a 'Delete/Modify' link. Below the table is a 'Delete Selected' button. Further down is a 'New Rule' section with dropdowns for 'From' and 'is', and a text input. Below that is a 'Move To' section with a 'Drafts' dropdown and a text input. At the bottom is an 'Add Filter' button.

Search Filters

If you have a lot of filters use this to limit the filters displayed below.

New Rule & Move To

This is the area to define a rule to have certain emails moved to other folders when they arrive in the user's inbox. E.g. New Rule: "From", "is" and "account@domain.com". Move To: "Trash"

3.4 Mail Options (Notification of DSM in State of AK Email Account)

User can specific mail options to perform when an email is received in their inbox from this screen.

The screenshot shows the 'Mail Options' settings page. On the left is a sidebar with 'Webmail Settings', 'Anti-Spam Settings', 'Email Filters', and 'Mail Options' (selected). The main area has a 'Save Settings' button in the top right. Below it are two sections: 'Enable Notifications' with an 'ON' toggle and a description 'Check to forward a notifications of new email to a non-Direct email address', and 'Notifications Address' with the text 'neville.mckay@orionhealth' and a description 'Optionally forward your notifications to a non-Direct email account'. Below these is another section: 'Enable Autoreply' with an 'OFF' toggle and a description 'Check to enable sending the Autoreply', followed by an 'Autoreply message' text area with a description 'Optionally define an auto-reply / vacation message for your email account'.

Enable Notifications

Select "On" to enable the sending of a notification email to a standard email address when an email is received in the user's inbox.

Notification Address

Specify the standard email address that you wish the notification to be sent to. Only one email address can be entered here.

Enable Autoreply

Select "On" to enable automatic ("Out of Office") reply to incoming messages.

Autoreply message

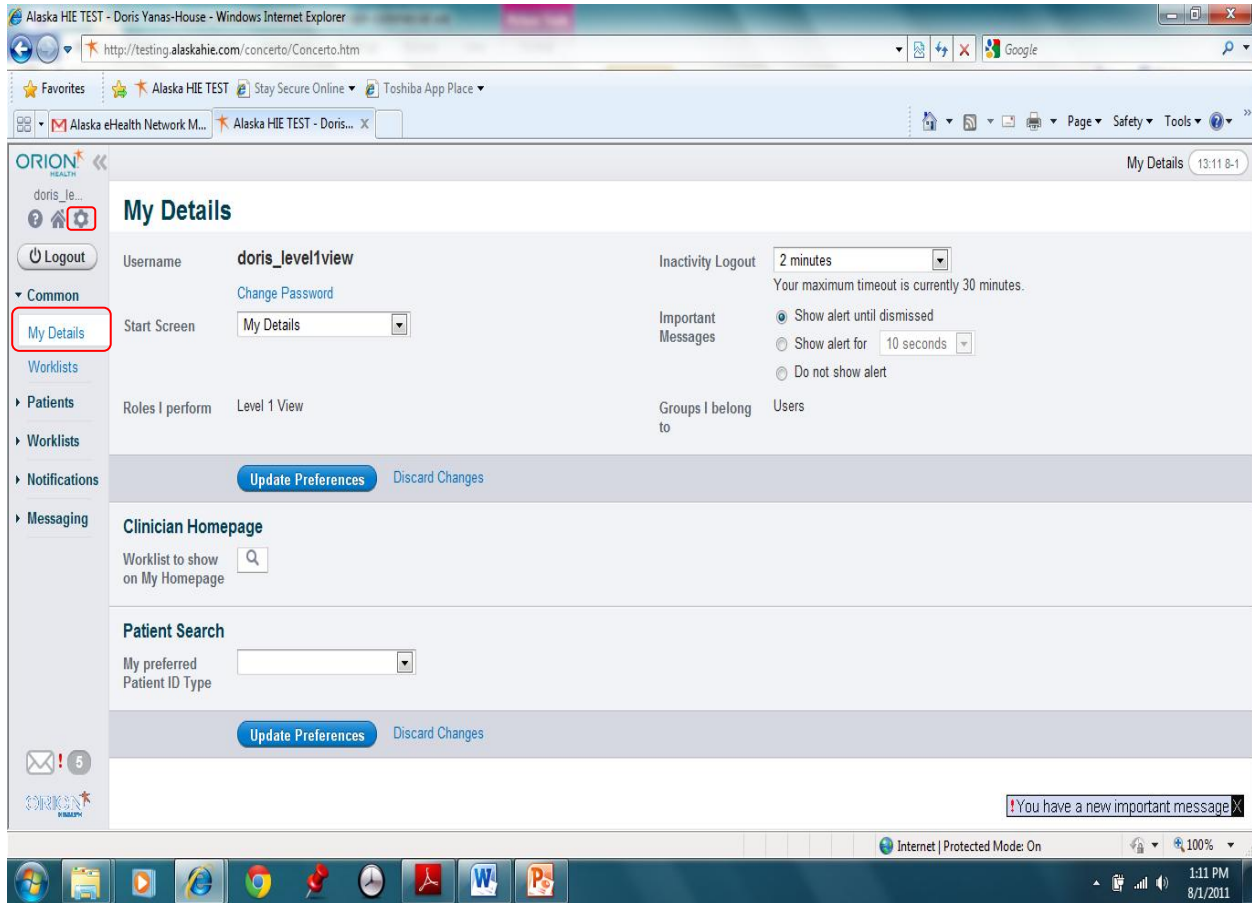
Specify the message to send to the senders of all incoming email when the Autoreply is on.

4 Personal Details

Personal Details enables user to change basic information such as password or inactivity logout in the system.

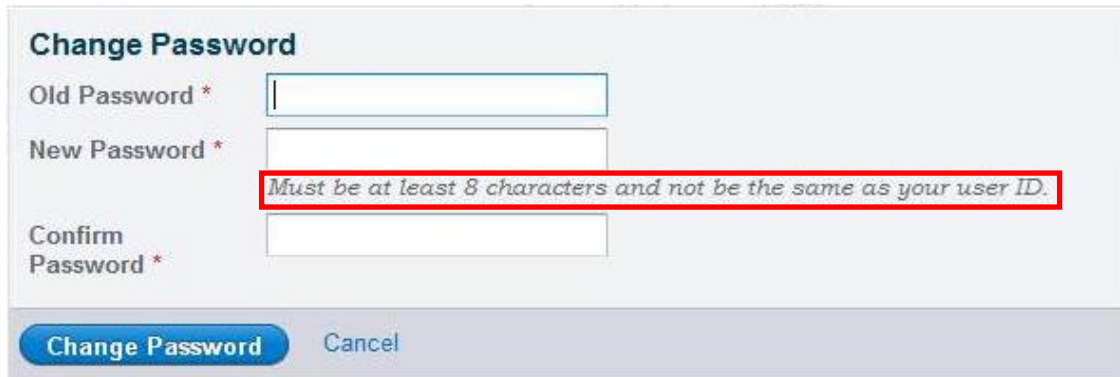
There are two ways to display this screen:

Click **Common>My Details** menu option OR Click the **Settings** Icon  above the **Logout** button.



4.1 To change your password

1. Click **Common>My Details**.
2. In the **My Details** panel, click the [Change Password](#) link. The **Change Password** dialog is displayed.

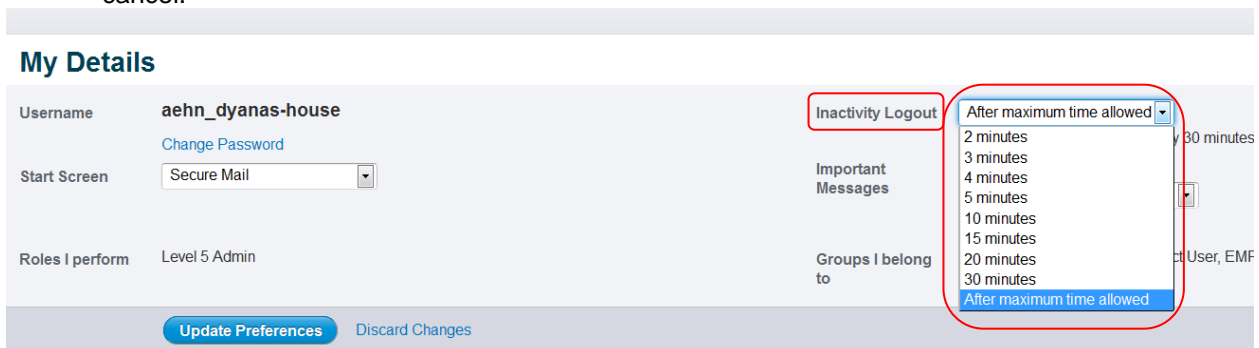


The **Change Password** dialog box contains three input fields: **Old Password ***, **New Password ***, and **Confirm Password ***. A red rectangular box highlights the text *Must be at least 8 characters and not be the same as your user ID.* which is positioned between the New Password and Confirm Password fields. At the bottom of the dialog are two buttons: **Change Password** (in a blue box) and **Cancel**.

3. Enter your **Old Password**.
4. Enter your **New Password**.
5. Reenter your new password in the **Confirm Password** field.
6. Click the **Change Password** button.
7. Click the **Update Preferences** button to save changes or click the [Discard Changes](#) link to cancel.

4.2 Setting the Inactivity Timeout Period

1. Click **Common>My Details**.
2. In the **My Details** panel, select a **Inactivity Logout** value from the drop-down list.
3. Click the **Update Preferences** button to save changes or click the [Discard Changes](#) link to cancel.



The **My Details** panel displays user information: Username **aehn_dyana-house**, Start Screen **Secure Mail**, and Roles I perform **Level 5 Admin**. On the right, the **Inactivity Logout** dropdown menu is open, showing options: **After maximum time allowed** (selected), 2 minutes, 3 minutes, 4 minutes, 5 minutes, 10 minutes, 15 minutes, 20 minutes, 30 minutes, and **After maximum time allowed** (at the bottom). Other settings visible include **Important Messages** and **Groups I belong to**. At the bottom are **Update Preferences** and **Discard Changes** buttons.